

FREQUENTLY ASKED QUESTIONS

ELIGIBILITY

Q. What determines my eligibility to participate in the Tuition Refund Program?

A. In order to participate in the program, you must:

- Be a full-time career employee, i.e. permanent (AA), probationary (AB), exempt (AC), trainee (AF), emergency (AH), substitute (AJ), or acting appointment in the classified service (AT) and;
- Have completed 13 pay periods of full time employment with the County and;
- Have achieved a rating of “satisfactory” or higher on the latest employee evaluation preceding the beginning of classes. An exception to this requirement can be made if an employee’s latest evaluation is less than “satisfactory” and the coursework relates directly to specific area of weak performance.

Q. Which expenses are eligible for reimbursement?

A. The chart below details common expenses and their eligibility for reimbursement:

EXPENSES TYPE	ELIGIBLE FOR REIMBURSEMENT	IMPORTANT TO KNOW
Tuition	Yes	This is the cost of instruction and is usually reported on a per credit hour basis.
Laboratory fees	Yes	
Instructional materials (e.g. books, videos, software, etc.)	No	
Audit fees, Parking fees, Examination fees, Athletic fees, Meals	No	
Tuition related “Plus” fees	Yes	Only “Plus” fees which are a component of and defined as <u>tuition</u> are reimbursable. In order to determine whether or not they will be reimbursed, a detailed breakdown of all the fees included in the “Plus” fees must be provided. If the breakdown is not provided, these fees will not be paid.
Online Learning Fees	Yes	

Q. What type of coursework is eligible for reimbursement?

A. The chart below details common types of coursework and their eligibility for reimbursement. Coursework eligible for reimbursement must be:

- Coursework that will enable employees to improve their performance in their current position and prepare them for increased responsibilities and;
- Approved by the Department Director and the Human Resources (HR) Employee Development Division (EDD) and;
- Taken at an accredited institution.

COURSEWORK TYPE	ELIGIBLE FOR REIMBURSEMENT	IMPORTANT TO KNOW
Degree program	Yes	Must be related to a career path in current position.
Individual courses not earmarked for a specific degree or certificate program	No	Coursework must be taken toward a specific degree or certificate program which supports a career path.
Certificate program	Yes	Must be related to a career path in current position.
Vocational	Yes	Must be related to a career path in current position.
Online and Internet courses	Yes	Online, Internet courses, and programs provided by <u>accredited Florida-based educational institutions</u> and related to a career path are eligible for tuition reimbursement. If the course is offered by an accredited institution which is not Florida-based, the Tuition Refund Appeals Board will review these requests for reimbursement on a case-by-case basis. Human Resources must receive such requests at least <u>30 days prior to the start of the course or program</u> .
Examination preparation courses	Yes	These include, but are not limited to real estate, professional engineer, CPA, law (Bar). They must be related to a career path in current position. Note: Test Preparation Programs must be taken at accredited universities and colleges

Q. If administrative or educational leave is granted to take a course during working hours, will I be eligible to receive Tuition Refund?

A. No, all courses must be taken outside of working hours unless the employee's Department Director approves the use of annual leave, compensatory time, or holiday leave. If administrative or educational leave is granted to take a course during working hours, no tuition refund will be granted.

Q. If I am on an approved educational leave of absence, will I be eligible to receive Tuition Refund?

A. Yes. Employees on an approved educational leave of absence are eligible for tuition reimbursement.

APPROVAL TO PARTICIPATE

Q. I have decided to pursue an Accounting degree. What is the first step that must be taken in order to participate in the Tuition Refund Program?

A. All employees must receive prior approval of their educational program before tuition refund can be claimed. The first step in the process is to complete and submit an *"Approval to Participate Form,"* prior to the start of your classes. This form will request information on your chosen educational program including, but not limited to, educational institution, major, credit hours required, estimated cost, and disclosures. This must be reviewed and approved by your Department Director or designee. You must also submit a copy of the curriculum with your application. Once your program of study has been approved by your Department Director or designee and the Human Resources' (HR) Employee Development Division (EDD), you will only need to complete the *"Reimbursement Claim Form"* when classes are completed. All required supporting documentation must be attached to claim form or payment will be delayed.

Q. I was originally approved for the Accounting Program, and have taken two semesters of coursework. I have decided that I would prefer to pursue a degree in Business Administration. Since I am changing my degree program, would I need to get the Business Administration program approved by my Department Director?

A. If the degree program is changing, you must complete and submit a new *"Approval to Participate Form."* These program/degree approvals are very specific to the program requested. If your major changes, you must re-apply for program approval.

Q. I am undecided about my major and would like to take a one or two courses sporadically in order to decide on my eventual field of study. Will I be allowed to do that?

A. You must take courses that are tied to a specific program or degree.

Q. The form states that I must initial that I have read, understand, accept, and will comply with the disclosure statements on the form. Is this step necessary?

A. If each statement is not initialed or the form is not signed, you will not be approved to participate in the program. Your initials of each disclosure statement and signature on the form show that:

- You understand the all the requirements, provisions and penalties of the tuition refund program and you will comply with them;
- You are completely and honestly disclosing all financial assistance received, regardless of the timing of its receipt;
- You understand penalties for misrepresentation of information, including changing grades or the amounts paid, or non-disclosure of pertinent financial information will result in denial of tuition refund, and may result in severe penalties including criminal prosecution, and disciplinary action up to and including dismissal from the County;
- You are authorizing Miami-Dade County to access your educational and financial records from your educational institution and disclose the confidential student information to the County;
- You are agreeing to the bonding period of one year. The bonding period starts from the class end date.

Q. I am an Accountant and I am interested in pursuing a degree in physical therapy. I completed and submitted the “Approval to Participate” form, and was denied. What recourse is available to me to appeal the decision?

- A. Assuming that you had met the basic eligibility requirements, that is, you are full-time, have completed 13 pay periods, and have achieved satisfactory or higher on your last performance evaluation, your application was likely denied on the basis of physical therapy NOT being related to your career path. If you feel that this decision was incorrect, a formal appeal must be filed within 30 days from the date of the action to the Human Resources, Employee Development Division, describing how or why the course or program in question is in compliance with the guidelines and intent of the program. The Tuition Refund Appeals Board will convene regularly to review all appeals. The Appeals Board’s decision will be communicated to you through your Department’s DPR/TRC.

FILING A CLAIM

Q. What types of financial assistance are considered non-refundable and included in the refund calculation?

- A. Only non-refundable financial assistance will be applied in calculating the amount of refund due to the employee. The following chart outlines various types of financial assistance and whether they will be considered in the calculation. If you have a situation that is not addressed in the chart below, **it is the responsibility of the employee to ask their Department Personnel Representative (DPR) or Tuition Refund Coordinator (TRC) for clarification.**

FINANCIAL ASSISTANCE TYPE	INCLUDED IN CALCULATION	IMPORTANT TO KNOW
Loans	No	This must be repaid. Therefore, it is not included in the calculation.
Florida Pre-paid	No	This is considered an out-of-pocket expense and is not included in the calculation.

529 Plan	No	This is considered an out-of-pocket expense and is not included in the calculation.
Fellowships	Yes	This is non-refundable assistance. Therefore, it is included in calculating the refund.
Grants	Yes	This is non-refundable assistance. Therefore, it is included in calculating the refund.
Scholarships	Yes	This is non-refundable assistance. Therefore, it is included in calculating the refund.
Employee Discount	Yes	This is non-refundable assistance. Therefore, it is included in calculating the refund.
Waivers	Yes	This is non-refundable assistance. Therefore, it is included in calculating the refund.
Military and veteran's benefits	Yes	This is non-refundable assistance. Therefore, it is included in calculating the refund.

Q. I have completed my coursework and received my grades from my educational institution. What should I do in order to receive my Tuition Refund?

- A. To be eligible to file any claim, you must have a prior approved *"Approval to Participate Form"* on file with your department and HR. Within 30 days of receiving your grades, you must complete the *"Reimbursement Claim Form"* and submit it to your Departmental Personnel Representative (DPR) or Tuition Refund Coordinator (TRC). Additionally, you must request that originals of your grade reports or official transcripts, detailed tuition payment receipts, and proof of financial assistance, if any, be sent directly to your department's DPR/TRC.

If this information is readily available online, you may, in the presence of the DPR/TRC, sign on to your respective school's web page, and review your grades, receipts, and financial information with your DPR/TRC. The DPR/TRC should then print, date, and sign the printout and submit as valid supporting documentation. You must also sign the printout.

If the web page does not contain all of the necessary information (where you can clearly ascertain there were no grants, financial aid, etc.), the school will need to submit additional documentation directly to your department. In these cases, the form, OPTIONAL Tuition Refund Authorization for Educational Institutions to Disclose Financial Documents should be used to collect this information. This form must be sent **directly** from the school to the employee's respective department's DPR or TRC.

If a certificate is provided by the institution as proof of successful completion of coursework, the original certificate must be presented to the DPR/TRC. The DPR/TRC should make a copy of the certificate and both the DPR/TRC and the employee sign and date it. **Only original DPR/TRC and employee signatures will be accepted.**

The claim for reimbursement must then be signed by the Department Director or his/her designee and forwarded to HR- Payroll and Information Management Division (PIM) for processing.

Q. Do I qualify for Tuition Refund if I fail a class?

- A. All employees who take “approved” coursework and achieve a grade that is “C” or higher and is acceptable by the school as a passing grade, will be eligible to receive a refund of 50% of tuition costs upon completion of the course. Where no grade is given, a certificate of “passing,” “satisfactory,” or “completed” will be accepted. Grades falling below this standard will not allow the employee eligibility for tuition refund assistance for that coursework.

Q. How is the Tuition Refund amount calculated?

- A. The amount is calculated by taking 50% of tuition costs minus the application of any non-refundable financial assistance including, but not limited to scholarships, fellowships, grants, employee discounts, fee waivers, and/or Veteran’s benefits (excluding student loans).

Example 1: John currently has a grant for \$1,000, a scholarship for \$500, and a student loan for \$250. He paid a total of \$2,500 for tuition this semester. His refund would be calculated as follows:

Tuition Paid: \$2,500

Non-Refundable Financial Assistance:	Grant-	\$1,000 (Non-Refundable)
	Scholarship-	<u>\$ 500</u> (Non-Refundable)
Total Non-Refundable Financial Assistance:		\$1,500

Tuition refund= (\$2,500-\$1,500) X 50% =\$500

Note that since a loan must be repaid, the loan amount does not offset the amount of tuition paid, and is not considered in the calculation. **Only financial assistance that does not need to be paid back is applied against the tuition paid and is considered in the calculation.**

Example 2: Mary has been approved to participate in a Master of Business Administration program. Her most recent refund claims are as follows:

Fall 2008- Her tuition fees totaled \$2,000 and there was no record of any non-refundable financial assistance. Therefore, she received a reimbursement totaling (50% of \$2,000) or \$1,000.

Spring 2008- Her tuition fees totaled \$500, and there was no record of any non-refundable financial assistance. Therefore she received a reimbursement totaling (50% of \$500) or \$250.

Summer 2008-Her tuition fees totaled \$750, and it was noted on her financial statement that a grant for \$1,400 had been awarded to Mary to cover the school year (Fall 2005 through Summer 2006). In this case we would apply \$750 of the \$1,400 grant to the Summer tuition claim. Therefore, she would receive no refund for the Summer semester.

However, we still have (\$1,400-\$750) or \$650 of grant money, which must be applied to the previous semesters. Therefore we would issue an overpayment for \$250 for the Spring semester, and the remaining \$150 of grant money would be applied to the Fall semester. She should have received 50% of (\$2,000-\$150) or \$925 for the Fall semester. Therefore her overpayment for Fall is (\$1,000-\$925) =\$75.

Q. Who should I contact if I have any questions regarding processing of my claim?

- A. You should contact your DPR or TRC if you have any questions regarding the processing of your claim. A current list is available at www.miamidade.gov/hr/tuition_refund.asp. If your DPR/ TRC is unable to assist you, they should contact HR for clarification or explanation on any tuition refund issue.

Q. How long does it take to receive the Tuition Refund?

- A. Employees will receive reimbursement in their pay check within approximately four weeks after all requirements are satisfied and documents are received by Human Resources. Please contact your DPR/TRC if there are any questions.

Q. Is my Tuition Refund taxable?

- A. The Internal Revenue Service (IRS) rules state that tuition reimbursements are non-taxable for amounts received up to \$5,250 per calendar year. For example, tuition reimbursements for Tom last year would have been taxed as follows:

TERM	DATE RECEIVED REFUND	AMOUNT RECEIVED	TAXED?	IMPORTANT TO KNOW
Spring	April 2008	\$3,500	No	Below the \$5,250 limit
Summer A	June 2008	\$2,000	A portion	The cumulative refund received this calendar year totals \$5,500. Therefore, only \$250 of the Summer A refund would be taxed. (\$5,500-\$5,250). \$1,750 would not be taxed.
Summer B	August 2008	\$2,000	Yes	The full amount would be taxed
Fall	December 2008	\$3,500	Yes	The full amount would be taxed

Q. What happens if I resign from my County job in less than a year after completing my coursework?

- A. All employees receiving reimbursement will be obligated to remain in the County for a minimum of one (1) year following completion of the coursework. Employees terminating from the County service prior to the expiration of this period will reimburse the County for refunds received during the final year of employment through deductions from their final payroll check. If the final paycheck is insufficient, the employee will still be responsible for the reimbursement.

Q. Will I have to reimburse the County if I was laid off within a year of the receipt of Tuition Refund?

- A. No reimbursement will be required of those employees who have been laid off and have been previously approved for coursework.